

The Estate and Gift Tax Committee of the Taxation Section  
of the State Bar of California presents

# The Fourteenth Annual Estate and Gift Tax Conference

**7.25 Hours of MCLE and  
Legal Specialization Credit  
Including 1 Hour of Prevention, Detection  
and Treatment of Substance Abuse**

**ONLINE REGISTRATION:  
[www.calbar.ca.gov/taxation](http://www.calbar.ca.gov/taxation)**

**Friday, January 20, 2006**

BEVERLY HILLS HILTON HOTEL  
9876 Wilshire Blvd # 1  
Beverly Hills, 90210  
310.274.7777

**Saturday, January 21, 2006**

THE RITZ CARLTON HOTEL  
600 Stockton Street  
San Francisco, 94108  
415.296.7465



The State Bar of California and the Taxation Section of the  
State Bar of California are MCLE approved Providers.

# PROGRAM SCHEDULE

7:30 AM - 8:15 AM

Registration & Continental Breakfast

8:15 AM - 8:30 AM

Welcome & Opening Remarks

8:30 AM - 10:30 AM

**Panel on Hot Topics in Estate and Gift Tax Audits and Current Developments**

A panel discussion format focusing on recent estate and gift tax case law and legislative developments and related issues of particularly current interest to estate planning practitioners.

*Gina Lera, Wagner, Kirkman, Blaine & Youmans, Sacramento*  
*Richard Ullman, Internal Revenue Service (B.H.)*  
*Donna Herbert, Internal Revenue Service (S.F.)*  
*Janet Holman, Internal Revenue Service, Oakland (S.F.)*

10:45 AM - 12:00 PM

**Planning for Resident Aliens (with some discussion of pre-immigration planning for NRAs)**

A detailed discussion of the unique issues related to estate and gift tax planning for resident alien clients and in-bound nonresident aliens; including tips and traps for the unwary.

*Jane Peebles, Bingham McCutchen, LLP, Los Angeles*

**12:15 PM - 1:30 PM**

### **Lunch Program**

#### **Substance Abuse Program**

Common Pitfalls of Legal Practice: an examination of the substance abuse and mental health problems frequently encountered by legal professionals and the resources that are available to address these problems. Including 1 hour of Prevention, Detection & Treatment of Substance Abuse.

*January 20, James Tracy, DDS, is a specialist in the intervention and treatment of substance abuse problems. He works with employers, families, and treatment providers throughout the country. He also serves on an Evaluation Committee for the Lawyer Assistance Program.*

*January 21, Richard Carlton, Deputy Director, Lawyer Assistance Program, The State Bar of California*

**1:45 PM - 3:15 PM**

#### **GST and Dynasty Trust Planning**

This program will focus on generation-skipping transfer tax planning with an emphasis on the use of long-term “dynasty” trusts as the primary wealth transfer vehicle.

*Robin Klomparens, Wagner, Kirkman, Blaine & Youmans, Sacramento*

*Douglas L. Youmans, Wagner, Kirkman, Blaine & Youmans, Sacramento*

**3:30 PM - 5:00 PM**

#### **Planning with Life Insurance**

This program will provide a primer on life insurance planning before moving into a discussion of more sophisticated planning topics; including a discussion and description of various life insurance products and their implementation into the estate plan.

*Philip B. Feldman, Coblentz, Patch, Duffy and Bass, LLP, San Francisco*

*Douglas Lem, UBS Financial Services, Inc.*

# REGISTRATION INFORMATION

## Register Online

[www.calbar.ca.gov/taxation](http://www.calbar.ca.gov/taxation)

## Registration by Mail

Your registration must be received no later than Tuesday, January 3, 2006. Please send your completed registration form and check payable to The State Bar of California to:

Program Registrations  
The State Bar of California  
180 Howard Street  
San Francisco, CA 94105-1639

## Registration by Fax

Fax to: Program Registrations at 415.538.2368. Visa/MasterCard ONLY. *Credit card information is mandatory.*

## On-Site Registrations

On-site registration opens at 7:30 AM and is subject to space availability.

## Cancellations/Refunds

Cancellations and request for refunds must be received in writing **no later than** Tuesday, January 3, 2006. Substitute registrants are allowed, but must register in their own name.

## MCLE Credit

The Taxation Section of the State Bar of California is a State Bar of California approved MCLE provider. This activity has been approved for 7.25 Hours of MCLE and Legal Specialization Credit Including 1 Hour of Prevention, Detection and Treatment of Substance Abuse.

## Special Assistance

Please call 415.538.2580 or TDD for speech and hearing impaired 415.538.2231.

## Questions

For registration information, please call 415.538.2508. For program content/Section information, please call 415.538.2580.

## Audio Tapes

Audio tapes of the program will be available with a complete set of program materials from Versa-Tape. To order, please call 800.468.2737.



# Registration Form

Register Online:  
[www.calbar.ca.gov/taxation](http://www.calbar.ca.gov/taxation)

## 2006 Annual Estate & Gift Tax Conference

Name \_\_\_\_\_  
State Bar Number \_\_\_\_\_  
Firm \_\_\_\_\_  
Address \_\_\_\_\_  
City, State and Zip \_\_\_\_\_  
Phone \_\_\_\_\_ Fax \_\_\_\_\_  
Email \_\_\_\_\_

### Location Choice (check appropriate box)

- ☐ January 20 – Beverly Hills  
☐ January 21 – San Francisco

### Program Registration Fees:

- ☐ \$295 Taxation Section Members  
☐ \$355 Non-Section Members (includes 2006 Section Membership)  
☐ \$355 After January 3, 2006 (2006 Section Membership not included)

### Government Attorneys:

- ☐ \$195 Taxation Section Members  
☐ \$255 Non-Section Members (includes 2006 Section Membership)  
☐ \$255 After January 3, 2006 (2006 Section Membership not included)

**SAVE MONEY BY REGISTERING BY TUESDAY, JANUARY 3, 2006**

## Credit Card Information

*I authorize The State Bar of California to charge my program registration fee to my VISA or MASTERCARD account. (No other credit card will be accepted.)*

Account Number: \_\_\_\_\_ Exp. Date: \_\_\_\_\_

Cardholder's Name: \_\_\_\_\_

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180 Howard Street, San Francisco, CA 94105. Make checks  
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**FAX to:** *Program Registration at (415) 538-2368  
Credit card information is mandatory.*

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**STATE BAR EDUCATION FOUNDATION**

*Estate and Gift Tax Committee of the Taxation Section*  
180 Howard Street  
San Francisco, CA 94105

First Class PRSRT  
U.S. POSTAGE  
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Documentation

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